ENROLLMENT TIMELINE TEMPLATE

TIMELINE CONSIDERATIONS	EVENT/ACTIVITY	PARTICIPANTS
Before enrollment	**Acquisition Phase (new account) Preliminary Planning (existing account)**	
• **Account has 2,000+ benefit eligible employees-** Contact Major Accounts to register account. • **Account has less than 2,000+ benefit eligible employees -** proceed with planning below	**Business Partnership Decision** • Account Information Form signed • Working Conditions established using the Enrollment Success Plan • Colonial product options and core benefit options finalized	Opener
	Gather Account Information • Meet with opener to Document Commitments and review account information that has been collected • Meet with plan administrator to complete the Welcome Call, request HR Data, Census Data, detailed location list, confirm the communications plan and establish the Enrollment Timeline	Coordinator
Consider timing needed to gain commitment of out of-state enrollers Submit Account Information Form prior to Welcome Call (new account)	**Business Set Up Paper Work Submitted** • Account Information Form and Group Master App (if group products are involved) • Commission Account Sheet • Sales Auto Enrollment Database Request Form or Harmony Set Up Request Form (If Home Office is building Database or Harmony site) • Core Set Up Sheet Completed (If Home Office is preparing the sales auto database or Harmony site	Opener, Coordinator
Allow time to submit new census to Underwriting for anniversary processing	**If Group products are involved:** confirm initiation of renewal process (existing accounts)	Coordinator
	Welcome Conference Call (for New	PA,